



**HELP YOUR ESCROWS PROCESS SMOOTHLY  
BY PROVIDING THE FOLLOWING INFORMATION TO ESCROW**

- Fully executed purchase contract and any counters/addendums
- Full names, contact information and addresses of all parties
- How you would like your clients escrow documents handled
- Status of the Earnest Money Deposit
- Loan information as completely as possible, including loan officers contact information
- Contingency periods
- Personalities of the parties can be crucial. If you have a buyer/seller whom you think may require special assistance or consideration, advising the escrow officer can eliminate a number of issues during the escrow
- Is your buyer going to reside in the property, or is it an investment property?
- Is your seller moving out of state, purchasing another home or other “following closing” information
- Advise buyer that they will need to decide how their names are to be shown (must match their ID) and what their vesting will be (they may need to consult with tax or legal counsel)
- Any other information pertaining to the transaction and/or your client is always appreciated, including any pending divorce of the parties, vacation or business trips during escrow, or other special considerations.

**ADDITIONAL HELPFUL TIPS**

- Accompany your client if and when they come to escrow to sign their escrow instructions and be aware of the importance of the completion of all forms that they are requested to complete and/or sign
- **Read** the escrow instructions before meeting with your client, comparing the instructions to your contract
- Understand the time elements involved with the new loans, documents and fundings so that you and your client know exactly what to expect, especially after loan approval has been received
- Understand the necessity of the Statement of Information forms. In almost all cases, the title company will require this form from each buyer and seller. The necessity for this document is to assist the title officer in clearing all liens and judgments. In the State of California, there are many residents with similar names and many judgments are recorded daily. The information contained in this form is held in strict privacy by the escrow and title offices.
- Learn to understand the HUD/Settlement Statement. **ALWAYS** request a copy of the settlement statement for your client prior to closing, reviewing it carefully and advising escrow of any questions and/or revisions. This is extremely beneficial to insure that you will be prepared for any questions that your client may ask you regarding the settlement statement.
- Should a “request for repairs” result in a monetary compensation from the seller to buyer, advising escrow immediately so that an amendment may be prepared. This credit is always subject to lender approval.
- Stay in constant communication with the lender and the escrow office, advising them of any changes in terms, closing dates, etc.

**THE KEY TO A SUCCESSFUL ESCROW TRANSACTION IS COMMUNICATION!**

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